




# Check In/Check Out in WorkFlows

## To check out items:

1. Click the Checkout wizard.
2. Do one of the following:
  - a. If the User Search helper is set in properties to display as the first step of the wizard, search for the user. The helper will automatically fill in the User ID box with the ID you select using this helper.
  - b. In the Card # box, scan the user's ID barcode.
  - c. If the Current button is available, click the button to select the last user record that was displayed, modified, or added.
  - d. Type the user ID in the Card # box, and hit ENTER or Get User Information on the bottom of the screen.
  - e. Use the User Search helper  to search for the user. If a list displays, select the user you want, and then click Check Out to User.

### BEFORE YOU BEGIN!

Read the [Circulation Properties](#) document and/or watch the two videos:

[Check Out Properties](#)

[Check In Properties](#)

**CheckOut**

**User information**

**Identify user**

Card #:  Current: **Johnson, Albertine 098**

**Identify item**

Item ID:

**List of checkouts**

| Title | Call number | Item ID | Date Due |
|-------|-------------|---------|----------|
|-------|-------------|---------|----------|

**CheckOut: User Search**

Search for:  Search

Index: **Name** AND OR Type: **Keyword**

In this library: **PWOOD**

Current: **Johnson, Albertine 098**

**List of users**

| Name | Card # | Alt ID | Phone |
|------|--------|--------|-------|
|------|--------|--------|-------|

Checkout To User Cancel

3. In the List of Checkouts heading, the number of items checked out displays. Under List of Checkouts, the item's title, call number, item ID, date due, and item type display. If the item that is charged results in a charge fee, the bill amount also displays.
4. If you select an item or group of items in the checkouts list and right-click, a circulation menu opens. From this menu, you can perform a variety of circulation tasks.
5. Repeat steps until all items are checked out.

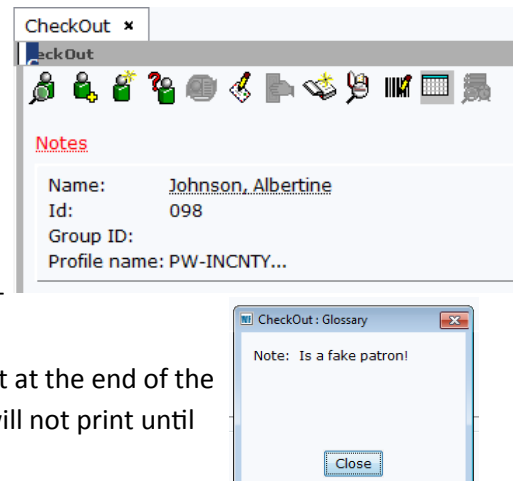
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6. After you have checked out items to the library user, select one of the following options:

- Check Out to New User to check out items to a new user
- Close to exit the wizard

### Important Considerations When Using this Wizard

- ◆ If the item being checked out is already charged to the user, the wizard may renew the item according to library policies.
- ◆ If the user has a NOTE on their account, Notes will appear in red above the user name. Clicking on Notes will reveal the note details in a pop-up box.
- ◆ If the user has a DELINQUENT or BLOCKED type user status, an alert window will display.
- ◆ If your library has configured due date slips to print a footer (lines of text at the end of the slip), and if you are checking out multiple items to the user, the footer will not print until you click either Checkout to New User or Close.



### To check in items:

1. Click the Discharge/Checkin wizard.
2. In the Item ID box, scan the item's ID. Notice that the item displays in the List of Discharges. To sort items in the List of Discharges in ascending or descending order, click the column heading of the column you want to sort.
3. If you select an item or group of items in the discharge list and right-click, a circulation menu opens. From this menu, you can perform a variety of circulation tasks.
4. Click Discharge Item to discharge the item you scanned.
5. Repeat the previous steps until all items are discharged.
6. After discharging items, select one of the following options:
  - ◆ Clear Discharge List to clear the discharge list.
  - ◆ Close to exit the wizard.

### Important Considerations When Using this Wizard

- ◆ If you are having a problem with the 'item not check out' error, uncheck the "Display item not checked out error in a separate window" box in the Checkin Properties.
- ◆ If a Current record exists for the item, click the Current record button to access the last record displayed, modified, or added.
- ◆ If you have set Display User Information option checked in the Checkin Properties, information from the user record displays under User Information.
- ◆ If a user has claimed to have already returned the item, and the Check for Claims Returned Items wizard property check box is selected, an alert window appears during the discharge/check in process. You can continue checking in items, open and modify the record of the user who claimed to have returned the item (when check in is complete), or cancel the discharge/check in process.